**IBM**

*&lt;Customer Name&gt;*

*IBM Master Data Management*
*Server Install Package*
*Service Description*

**January 1, 2010**

**Information Management** software

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# 1.    Description of Services

Information Management Analytics & Optimization (IMAO) is pleased to submit this Service Description to <Customer Name> (<Cust Name>).  <Cust Name> has requested the following services from IBM:

> ➢ IBM Master Data Management Server (MDM Server) Install Package

This service provides the expert resources to install the MDM software at your site.  The Delivery Consultant will help guide <Cust Name> on proven strategies and procedures that have been employed at other MDM installations.  The completed installation also verifies that the software is supportable by IBM's Product Support organization.

The scope of the MDM Server Install Package is limited to the installation and a base configuration of MDM Server – Blue Stack[1].

The MDM Server Install Package will provide:

- Review  <Cust Name>'s environment[2]

- Review the MDM Installation Environment Checklist (appropriate for customer's specific environment, AIX, LINUX, MQ, WAS)
  - Verify Platform meets the MDM Minimum resource requirements
  - Software Installation
    - o   Versions, fix packs
    - o   WAS
    - o   DB2, MQ
    - o   Network Connections

- Create and Verify:
  - WAS Cells
  - Queue Manager
  - MDM Database for MDM

- Determine WAS Security & Test

- Install MDM Software Package

- Verify Logs
  - Installation Logs and System Logs

- Post Install Review with technical team

- System Administration Handoff
  - Transfer of Information

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[1] The IBM MDM Server Install for a Blue Stack includes the installation of one MDM server and the following components:  Database, Application, Messaging, MDM Backend, Java Client, and two MDM Web UI Applications.  Installation and configuration of any additional services or servers other than those required as part of the installation of MDM Server are considered additional options. Contact your Services Sales Manager (SSM) for pricing for any additional services.
[2] Installation of prerequisite products (hardware and software) required for the MDM Server Install is <Cust Name>'s responsibility. Please see the **MDM Server Requirements page** found on http://www-01.ibm.com/software/data/infosphere/mdm_server/requirements.html?S_CMP=rnav.

- Routine Maintenance

- Backup Methodologies

- Problem Reporting

• Demonstrate the product to the Project Team

• Deliver

- MDM Server Installation Documentation for customer environment

• SIM  and coordination to facilitate a professional project delivery

This Install Package includes a set of tasks that <Cust Name> must complete to facilitate the product installation and rollout.  The actual duration of each task varies from customer to customer, based upon their knowledge of the products and the complexity of the anticipated CM environment.

The resources required for this project will include both the IBM and <Cust Name> personnel that are required to install and configure the MDM Server software.

At the completion of the MDM Server Install Package, <Cust Name>'s system and resources will be ready for maintenance support.

Any change in the scope of work defined in this Service Description requested by <Cust Name> may result in additional costs and must be documented in a Project Change Request (PCR).

## 2.    Recommended Product Training

As part of the delivery, <Cust Name> is recommended to have at least one person complete (or have previously completed) the following IBM training.  The IBM education recommended for this installation is as follows:

• Course Code: DC50 – Master Data Management Server Overview

• Course Code: DC53 - InfoSphere MDM Server Domains

• Course Code: DC54 - InfoSphere MDM Server Workbench

• Course Code: DC55 - InfoSphere MDM Server Architecture

*Please note that IBM may offer an equivalent Instructor Led Online (ILO) or Self Paced Virtual Course (SPVC). Any of these courses will satisfy this installation package training requirement.*

The cost for these training courses is not included in this MDM Server Install Package.  Please refer to the IBM Learning Services web site for detailed information regarding class cost, schedules, course descriptions, ordering options, registration instructions and relevant IBM web site locations.

While the training defined in this service provides a good foundation for administering the system in a pre-production status, <Cust Name> should not consider this the total set of training that their resources will need to manage their production system.  The IMAO Service Seller can assist <Cust Name> in obtaining a recommended training plan specific to <Cust Name>'s requirements.

IBM Learning Services web site:
         www.ibm.com/software/data/content-management/training.html

In the interests of quality education, IBM reserves the right to update training courses at any time.

# 3. Resources

The <Cust Name> Project Team will consist of the resources from the IBM Account Team, the <Cust Name> technical staff and, when applicable, an IBM Business Partner.  Examples of Project Team members are listed below.

## 3.1 IBM Team Resources

The IMAO Software Services Project Lead coordinates the appropriate IBM resources as required.  The IBM Team typically includes the following members:

- Solution Implementation Manager (SIM) – Project Lead
- MDM Server Installation Specialist (Delivery Consultant)

## 3.2 <Cust Name> Team Resources

<Cust Name> will need to identify internal personnel to fill the roles of the <Cust Name> Project Team.  <Cust Name> is responsible for selecting a Project Lead to share lead responsibilities with the IMAO Software Services Project Lead.

Depending upon, the project the <Cust Name> Project Team may include any of the following roles:

- Project Lead
- Infrastructure Architect
- System Administrator (MDM Server Administrator)
- Information Security Resource
- WebSphere Administrator
- WebSphere MQ Administrator
- Database Administrator
- MDM Application Owner

# 4. Role Definitions

<Cust Name> will need to identify internal personnel to fill the roles as listed in Section 3, Resources.  The following outlines the general roles for each of these individuals.  Please note that additional resources may be required at various phases of the installation.  Likewise, not all of the individuals may necessarily be involved in this Install service.

| ROLE | RESPONSIBILITY |
|---|---|
| **Project & Architecture** | |
| Project  Lead | • Responsible for process, deliverables, and overall project management; Accountable to business drivers. <br> • Coordinator of resource assignments. <br> • Develop and manage issues resolution and escalation procedures. |

| ROLE | RESPONSIBILITY |
|------|----------------|
| Infrastructure Architect | • Responsible for designing the technical infrastructure to meet business and technical data integration processing requirements.<br><br>• Responsible for ensuring that the application design is optimized to meet response requirements. |
| System Administrator (MDM Server Administrator) | • Administration of servers used in MDM environment<br><br>• Work with our MDM Installer to receive knowledge transfer in order to learn how to do basic administration of MDM server package. |
| WebSphere Administrator | • Administrator of WAS application server<br><br>• Works with the IBM MDM Installer to make sure that MDM components are installed correctly and application pieces run efficiently and correctly |
| WebSphere MQ Administrator | • Messaging infrastructure administrator<br><br>• Works with IBM MDM Installer to ensure that messaging components are installed correctly and run efficiently and effectively |
| Database Administrator (DBA) | • Database commissioning: installation, configuration, deployment.<br><br>• Database management: user accounts, security, performance.<br><br>• Provides support to meet data integration development and operational requirements. |
| MDM Application Owner | • This could be system administrator or separate resource who is specifically responsible for MDM server<br><br>• Receives knowledge transfer on MDM basic functionality, also attends additional recommended classes to gain further knowledge of MDM server |

# 5. Responsibilities

## 5.1 <Cust Name> Responsibilities

In order to facilitate delivery, <Cust Name> has the responsibility to provide the following:

a.) Project Prerequisites

– All prerequisites must be met before IBM can begin the installation of the product.

– All hardware, software, and network configurations must meet MDM requirements for system size and performance for the purchased software.  This includes:
  ➢ Installation of the operating system
  ➢ Install & Verify access to the DB2 database software
  ➢ Install & Verify access to the WebSphere application server
  ➢ Install & verify access to MQ messaging softaware
  ➢ Installation and/or application of appropriate levels of patches to meet MDM's minimum requirements

– Perform a network check (verify server connectivity to network, addressing, correct protocol).

– Download the MDM software to the appropriate servers prior to the resource arriving at <Cust Name>'s facility.

– Complete the *MDM Installation Environment Checklist*.

b.) A Project Lead with sufficient authority to:

– Represent <Cust Name>'s interests

– Serve as the focal point for all decisions and communications

– Coordinate activities assigned to <Cust Name> resources

– Sign project-related documents

After the <Cust Name> System Administrator has observed the Delivery Consultant during the installation and received the system administration handoff he or she will be responsible for ongoing system administration.

c.) Adequate facilities for each Delivery Consultant including:

- cubicle, desk, telephone, and Internet access,

- remote access (e.g., VPN access),

- direct access to the keyboard.

d.) <Cust Name> needs to prepare and provide to Delivery Consultant one Windows Workstation equipped with Microsoft  Office Word and Utility Software: Telnet (putty, ssh as examples), Ftp/sftp, X-server (i.e., Exceed, or Reflection, or Cygwin) for access to MDM Server in order to perform installation.

e.) When performing remote work, <Cust Name> will provide VPN access into <Cust Name>'s network and remote access to a workstation in the network that:

- can connect to all required servers and

- is preloaded with all required connectivity tools appropriate to <Cust Name>'s environment.

f.) Product Subscription and Support Agreement in place through IBM.

g.) <Cust Name> will make available all <Cust Name> personnel required for this project based on the agreed-upon project schedule.  Any significant delays caused by <Cust Name> personnel not being available or project prerequisites not being met may result in schedule delays, which can impact the project sufficiently to require a chargeable PCR addressing additional or extended IBM personnel requirements and additional costs.

## 5.2    IBM Responsibilities

a.) Review Environment

b.) Deliver & Review *MDM Installation Environment Checklist*

– Verify Platform meets the MDM Minimum resource requirements

– Software Installation

o Versions, fix packs

o WAS

o DB2, MQ

o Network Connections

c.) Create and Verify:

– WAS Cells

– Queue Manager

– MDM Database for MDM

d.) Determine WAS Security & Test

e.) Install MDM Software Package

f.) Verify Logs

– Installation Logs and System Logs

g.) Post Install Review

– Install Verification for MDM Backend and Clients

– IVT – Installation Verification Tool

– Batch Processor Test

– UI Application Test

– Messaging Component Verification

h.) Perform System Administration Handoff

– Transfer of Information

– Routine Maintenance

– Backup Methodology

– Problem Reporting

i.) Demonstrate the MDM Blue Stack to <Cust Name> Project Team

j.) Deliver

– IBM Server Installation Documentation for customer environment

k.) Provide <Cust Name> a completed MDM Server Install IBM Checklist

# 6. Assumptions & Limitations

## 6.1 Assumptions

a.) Installation of MDM Server will not be in a highly available environment.

b.) Additional resources and time for the development of "custom applications" are not included in this service.

c.) Full control over the entire server environment, IBM needs full access, password, logins and administrator privileges to Server environment in order to proceed with install

d.) Does not include time and/or resources to define and/or implement Security configurations.

## 6.2 Service Limitations

The MDM Server Install Package does not include repairs, corrections or troubleshooting of performance degradation, data corruption, errors and faults that are discovered during the process due to hardware failures, or non-qualified hardware or operating systems.  Repairs, corrections or troubleshooting of such errors and faults will be <Cust Name>'s responsibility; any IBM involvement will be charged on a Time-and-Materials (T&M) basis.

IMAO Software Services resources will be provided Monday through Friday from 8:00 a.m. to 5:00 p.m., excluding holidays and vacation time.  Specific details regarding schedules will be mutually agreed-upon prior to the project start-date.

### 6.2.1 Travel & Living Expenses

This Package does **not** include domestic travel and living expenses incurred by IMAO Software Services resources traveling to <Cust Name>'s site in order to fulfill IBM's tasks and responsibilities pertinent to delivering this service.

The Delivery Consultant may travel to <Cust Name>'s site for **one** (1) visit for tasks associated with delivering this service.  The SIM will initiate the project with a kickoff conference call.  It is intended that status meetings will be held via conference calls. <Cust Name> will be billed actual travel and living costs.

IBM will invoice <Cust Name> for travel and living expenses and other reasonable expenses incurred in connection with the Package delivery.  Amounts are due upon receipt of invoice and payable within 30 days. <Cust Name> agrees to pay accordingly, including any late payment fee. <Cust Name> does not have to pay any amount disputed in good faith while it is being investigated, but <Cust Name> remains obligated to pay any amount not in dispute.

Additional on-site assistance requested by <Cust Name> beyond the number of visits indicated above will be billable subject to the execution of a PCR.  IBM also reserves the right to bill <Cust Name> for any additional trips that are the direct result of <Cust Name>'s failure to meet or perform its obligations outlined herein.

# 7. Project Tasks & Deliverables

The Project Team will perform the following tasks.  Deliverables for each task are detailed within the task descriptions.

## 7.1 Task 1: Kickoff Meeting

The purpose of this meeting is to prepare both the <Cust Name> team and the IMAO Software Services team for the MDM Server Install Project.  Topics of discussion will include <Cust Name>'s requirements, expectations, prerequisites, and schedules.

### 7.1.1 Review Project Services Description

The IMAO Software Services Project Lead will review the Install Package Service Description, the installation tasks, and roles and responsibilities with <Cust Name>'s Project Team.

### 7.1.2 Define and Review Project Plan

Once selected, the joint <Cust Name> and IBM Project Team customizes the sample project plan defining mutually agreed-upon dates for delivery (see Sample Project Plan).  Each task is assigned a resource and a time window based on the effort required to complete the task.  IBM strongly encourages the practice of joint task assignments as an excellent means of training and knowledge transfer for the team members.

### 7.1.3 Project Status

The <Cust Name> PM will track all issues and document their resolution in an Issues Log.  Any issue whose resolution requires a change will be documented in a PCR.

## 7.2 Task 2: Environment Review

The Delvery Consultant will review the MDM software purchased, <Cust Name>'s server configuration (hardware, operating system and site specific software), MDM Server-specific network configuration, and <Cust Name>'s System Diagram.  This review will encompass the items indicated in the *MDM Server Installation Environment Checklist* that is delivered to <Cust Name>.  Upon completion of <Cust Name>'s portion of this document, the SIM will schedule the software installation.

IBM recommends reviewing any questions arising from the completion of the *MDM Server Installation Environment Checklist* during the weekly status calls.

Typical Agenda Review:

- Designated hardware system is installed and operational.

- Ensure the prerequisite operating system, software and networking are installed and operational, in accordance with the MDM Server Environment Prerequisite Checklist

- Database, WAS, MQ and any other critical components in architecture are installed, running and connectivity established to designated hardware

- Completes all items from the environment prerequisite checklist prior to the start of the Install.

## 7.3    Task 3: Software Installation

The Delivery Consultant, with the assistance of <Cust Name>'s Information Technology (IT) staff, will schedule the server software installation.  <Cust Name>'s IT staff must review the release notes included on the software media, which provides the latest information regarding operating system software release levels and patches required for software installation.

IBM Recommends that the MDM System Administrator attend the Master Data Management Server Overview training prior to this step to facilitate appropriate system configuration choices and ease support transition to <Cust Name>.

### 7.3.1   Create & Verify

The Delivery Consultant will work with the System Administrator to create the following items and verify.

- WAS Cells - Includes WebSphere Application Server deployment manager and custom profiles ( WAS-ND Edition) or stand-alone profile (WAS-Base Edition).

- Queue Manager - Includes MQ queue manager, channel, and queues for MDM.

- MDM Database for MDM - Includes database creation, node and database catalog on application server and test the database connection.

### 7.3.2   Determine WAS Security & Test

WAS global security is turned off during MDM installation. If client needs to turn on WAS security before install, client needs to make sure WAS cell for MDM is configured with LDAP and tested the connection using predefined users and groups.

### 7.3.3   Install MDM Software Package

MDM software including MDM back-end application, MDM DataStewardship Web application and MDM BusinessAdmin Web application will be installed. MDM Java client applications (IVT, Batch Processor, ManagementAgent and ManagementConsole) also will be installed and configured.

## 7.4    Task 4: Verify Logs

The WAS application server system logs as well as MDM application logs will be reviewed and verified to make sure that no errors or exceptions are present in the install and that all components installed properly.

## 7.5    Task 5: Post Install Review

During post install review the Delivery Consultant will review the following items:

- Install Verification for MDM Backend and Clients

- IVT – Installation Verification Tool

- Batch Processor Test

- UI Application Test

- Messaging Component Verification

## 7.6 Task 6: System Administration Handoff

There are 4 basic "handoff" procedures that will be performed in order to verify and transfer the appropriate knowledge to the customer they are outlined below.

### 7.6.1 Transfer of Information

The Delivery Consultant will review the MDM Server with the <Cust Name> System Administrator to better prepare <Cust Name> manage the system.  Topics to be reviewed:

- Basic stopping & starting of MDM environment

- Knowledge transfer and walk through of Installation Documentation

### 7.6.2 Routine Maintenance

Routine maintenance involves reviewing the daily duties of <Cust Name>'s System Administrator with respect to maintenance of the MDM Server.  These are tasks that should be performed daily and will be specific to <Cust Name>'s usage of the system and its configuration.  IBM recommends that the System Administrator develop a schedule of "housekeeping" procedures and tasks to be performed.  Some examples include:

- Checking system services

- Monitoring system usage

- Initiating CM system backup preparation

- Checking the event log

- Checking CM system administration log

- Checking the amount of free space

### 7.6.3 Review Backup Methodologies

The Delivery Consultant will review possible backup strategies with the <Cust Name> System Administrator. This Install Package does not provide for the Delivery Consultant to analyze <Cust Name>'s neither backup objectives nor does it develop the plan to meet those objectives.

### 7.6.4 Problem Reporting

Before calling IBM Customer Support, full documentation of the problem at hand always expedites resolution and helps maintain internal system up-time records.  The Delivery Consultant will review troubleshooting and problem reporting procedures and provide a trouble report template to <Cust Name>.  Over time the <Cust Name> System Administrator will learn to determine the nature of problems that arise and will be able to resolve or report them as necessary.

For integrity issues, IBM requests that <Cust Name> contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).

## 7.7 Task 7: Demonstrate System to <Cust Name> Project Team

After the initial installation has been tested, IBM will demonstrate the MDM Server to the <Cust Name> Project Team.  Other uses for the system are often identified in such meetings, giving impetus for follow-on projects.

## 7.8 Task 8: Deliverable Documents

As <Cust Name> tests the system, the Delivery Consultant will provide <Cust Name> the completed Installation Documentation, which includes the installed MDM Server software versions and patches.  This document represents a starting point for ongoing maintenance and modification of the system.

## 7.9 Task 9: Project Completion Checklist

Upon demonstration of the product the Delivery Consultant will deliver to <Cust Name> a completed Install Checklist which constitutes completion of this project.  Please refer to *MDM Server Install Completion Checklist*.

If issues arise after delivery of the Project Completion Checklist, <Cust Name> should contact IBM Customer Support by using the IBM toll free Customer Service telephone number (1-800-429-7378).